

Estate Loan Settlement Documentation Checklist

Date: _____

To: [Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

As part of the estate loan settlement process, please find below a checklist of documentation required for a smooth transaction.

Documentation Checklist

- Copy of death certificate
- Will or Trust documents
- Proof of identity for executor or administrator
- Loan account statements
- Property valuation report
- List of debts and liabilities
- Tax returns for the last three years
- Estate inventory
- Settlement agreement if applicable

Thank you for your attention to this matter. Please ensure all documents are submitted by [due date] to facilitate timely processing.

Sincerely,

[Your Name]

[Your Title]

[Your Company/Organization]

[Your Contact Information]